

State of California
Department Of Alcohol and Drug Programs

User Manual Supplement for SRIS version 3.0
SACPA Reporting Information System

Effective April 2, 2002

INTRODUCTION	1
A. AUTOMATION OF THE NARRATIVE PORTION OF THE COUNTY PLAN AND OTHER PLAN CHANGES	2
HOW TO ADD A PLAN INCLUDING THE PLAN QUESTIONS AND PLAN DESCRIPTION	3
<i>Navigation between Plan Sections.....</i>	<i>4</i>
COUNTY PLAN ELEMENT CHANGES	5
<i>Entity Plan.....</i>	<i>5</i>
<i>Service/Activity Plan</i>	<i>7</i>
<i>Client Projections.....</i>	<i>9</i>
<i>Capacity Projections.....</i>	<i>11</i>
<i>Plan Questions Page.....</i>	<i>12</i>
<i>Plan Description Files.....</i>	<i>16</i>
<i>Plan Revision</i>	<i>20</i>
B. ADDITION OF INQUIRY ONLY ACCESS FOR COUNTY AND ADP USERS	21
C. AUTOMATION OF COUNTY SUBMISSIONS FOR SATTA (SB 223).....	21
D. GOVERNOR’S WEB PAGE STANDARDS	23

Introduction

The purpose of this user manual supplement is to describe key enhancements to the SACPA Reporting Information System under Build 3.0. Enhancements to the automation system include:

- automation of the narrative portion of the county plan
- automation of the County Plan portion of SATTA (SB 223)* reporting
- addition of inquiry only access types for county users
- elimination of direct and administrative splits for the service/activity portion of county plans
- update of the system to meet the Governor's web page standards

For detailed instructions on existing functionality please refer the SACPA Reporting Information System User Manual. The manual can be found at on the ADP website at:
http://www.adp.state.ca.us/SACPA/P36_SRIS_SystemDocumentation.shtml.

*Substance Abuse Treatment and Testing Accountability (SATTA) Program enacted by SB 223, Ch 721, 2001 Statutes.

A. Automation of the Narrative Portion of the County Plan and other Plan Changes

The narrative description portion of the County Plan submission has been automated and made available to county users via the SACPA web application. The County Narrative Plan has been added to the Fiscal Plan. Since the Fiscal Plans list will now contain both fiscal and narrative information, all references to the Fiscal Plan have been changed to County Plan or Plan.

An example of the screen changes is displayed below.

Department of Alcohol and Drug Programs **SACPA Reporting Information System**

Sutter County **Dept of Human Svcs/Div of Mental Hlth-Alcohol and Drug Prgrms**

Plan List

To update Plan Information, select a Plan and click the **Update Entity**, **Update Service/Activity**, **Update Client Projections**, **Update Capacity Projections**, **Update Plan Questions**, or **Go To Plan Description Files** button.
 To add a Plan, click the **Add Plan** button OR select a Plan and click the **Copy & Create New Version** button.
 To add a Revision to a Plan, select a Plan and click the **Create Revision** button.
 To delete a Plan, select a Plan and click the **Delete Plan** button.
 To update the status of a Plan, select a Plan and click the **Update Status** button.

	Fiscal Year	Plan Type	Version or Rev.Date	Last Revised	Status	Total \$ Allocated per Plan (Entity)	ADP \$ Allocation	Allocation \$ Difference (ADP Allocation - Plan (Entity))
<input checked="" type="radio"/>	2002/2003	0	3	03/15/2002	Draft	14,360	15,000	640
<input checked="" type="radio"/>	2001/2002	0	2	03/15/2002	ADP Approved	10,700	11,000	300

Update Entity Update Service/Activity Update Client Projections
 Update Capacity Projections Update Plan Questions Go to Plan Description Files
 Add Plan Copy & Create New Version Create Revision Delete Plan
 Update Status

The county narrative plan section will be made up of two components. 1) A web form comprised of questions from Part I of the County Plan Template and 2) a plan description file upload process. These new elements will be subject to the same rules as the current Fiscal Plan including status restrictions, versions and revision rules, etc.

Users will have access to two new buttons on the Plan List screen. These new buttons are:

- 1) **Update Plan Questions:** this button will bring the user to the Plan Questions page that contains the questions from Part I of the County Plan Template
- 2) **Go to Plan Description Files:** this button will bring the user to a page that will allow the user to attach, view, download and delete Plan Description files and Board of Supervisors Resolution or other action approving the plan.

How to Add a Plan including the Plan Questions and Plan Description

The 'Add Plan' function has not changed in SRIS 3.0.

What to Do

1. Choose 'County Plans' link on the navigation bar

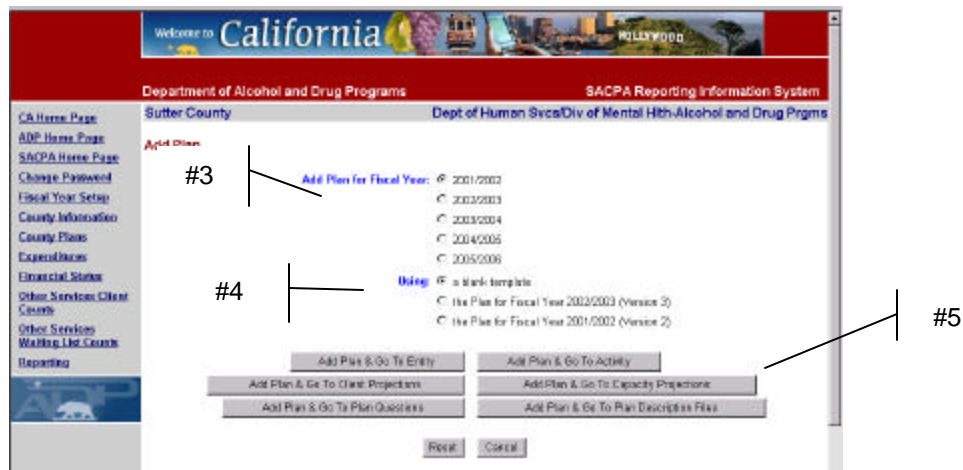
Results/Comments

This will bring the user to the County Plan List



2. To add a plan choose the 'Add Plan' button

This will bring the user to the 'Add Plan' screen



3. Select a Fiscal year by choosing the radio button next to the fiscal year you would like to add

The screen display reflects a change to radio buttons from drop down menus to address the Governor's web page standards (see section D for details)

4. Select either a blank template or copy an existing plan by choosing the radio button next to your choice

Note: If the user chooses to copy an existing plan the Plan Description files and Plan Questions associated with that plan will be copied as well

5. Then choose the one of the following buttons:

- Add Plan & Go to Entity
- Add Plan & Go to Activity
- Add Plan & Go to Client Projections
- Add Plan & Go to Capacity Projections
- Add Plan & Go to Plan Questions
- Add Plan & Go to Plan Description Files

The users have two new options on the 'Add Plan' screen. Users have the option to go to the Plan Questions page or to the Plan Description page directly

Navigation between Plan Sections

The navigation between plan sections will be changed to accommodate the two new narrative sections. To allow easier navigation between sections, the update buttons will be moved to links on the navigation bar at the left of the screen when the user enters any of the six screens. These links will not be present unless the user is in one of the following pages:

- Entity
- Service/Activity
- Client Projection
- Capacity Projections
- Plan Questions
- Plan Description Files

An example of this navigation bar change is demonstrated below.

Current Navigation Bar from outside the Plan section:

Department of Alcohol and Drug Programs					SACPA Reporting Information System			
Sutter County					Dept of Human Svcs/Div of Mental Hlth-Alcohol and Drug Prgrms			
CA Home Page ADP Home Page SACPA Home Page Change Password Fiscal Year Setup County Information County Plans Expenditures Financial Status Other Services/Client Counts Other Services Waiting List Counts Reporting					Plan List To update Plan Information, select a Plan and click the Update Entity, Update Service/Activity, Update Client Projections, Update Capacity Projections, Update Plan Questions, or Go To Plan Description Files button. To add a Plan, click the Add Plan button OR select a Plan and click the Copy & Create New Version button. To add a Revision to a Plan, select a Plan and click the Create Revision button. To delete a Plan, select a Plan and click the Delete Plan button. To update the status of a Plan, select a Plan and click the Update Status button.			
	Fiscal Year	Plan Type	Version or Rev.Date	Last Revised	Status	Total \$ Allocated per Plan (Entity)	ADP \$ Allocation	Allocation \$ Difference (ADP Allocation - Plan (Entity))
<input type="radio"/>	2002/2003	0	3	03/19/2002	County Approved	14,300	15,000	640
<input type="radio"/>	2001/2002	0	2	03/15/2002	ADP Approved	10,700	11,000	300

The navigation bar from inside a Plan section:

Delete Line	Entity Type	Direct Services	Administrative Activities	Total	% ADP Allocation (15,800)
	Drug Treatment	10,500	1,300	11,800	78.67
		0	0	0	0
		0	0	0	0
		0	0	0	0
		0	0	0	0
		0	0	0	0
		0	0	0	0
		0	0	0	0
		0	0	0	0
	Drug Treatment Sub Total	10,500	1,300	11,800	78.67

The buttons at the bottom of each Plan section screen will now be limited to Submit, Reset, and Cancel.

County Plan Element Changes

Once a plan is added the user can begin updating the plan with County Plan information. The county plan is made up of six elements. Five of the elements are web forms and the last is a file upload function for the plan description.

The existing Fiscal Plan pages (Entity, Service/Activity, Client Projections and Capacity Projections) have been retrofitted with the SATTA (SB 223) reporting requirements. Each page and the associated changes are described below. The two new elements (Plan Questions and Plan Description upload) will also be discussed in detail in the following pages.

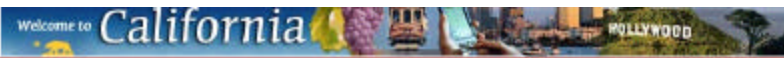
Entity Plan

The Entity Plan page has changed to include the new SATTA (SB 223) reporting requirements. The following fields have been added for SATTA (SB 223):

- Entity Type responsible for administering the drug testing for SACPA clients
- Entity Type planned dollars for Direct Services
- Entity Type planned dollars for Administrative Services

Note: Data entry of Direct Service and Administrative Service costs is optional.

An example of the page is displayed on the following page:

Welcome to **California**  **HOLLYWOOD**

Department of Alcohol and Drug Programs **SACPA Reporting Information System**

Sutter County **Dept of Human Svcs/Div of Mental Hlth-Alcohol and Drug Prgrms**

Original Plan Entity Information for Fiscal Year 2002/2003, Version 3

Status: Draft Created: 03/13/2002 Last Revised: 03/15/2002

To add/update Plan Entity Information, enter Entity Type and Planned Dollars information and click the Submit button.

Delete Line	Entity Type	Planned Dollars			% ADP Allocation (15,000 = 0 - 15,000)
		Direct Services	Administrative Activities	Total	
Drug Treatment					
<input checked="" type="checkbox"/>	Drug Treatment	10,500	1,300	11,800	78.67
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
Drug Treatment SubTotal		10,500	1,300	11,800	78.67
Other Service					
<input checked="" type="checkbox"/>	Other Services	1,200	150	1,350	9
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
Other Service SubTotal		1,200	150	1,350	9
Criminal Justice					
<input checked="" type="checkbox"/>	Court Probation	1,100	110	1,210	8.07
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
Criminal Justice SubTotal		1,100	110	1,210	8.07
Entity Grand Total		12,800	1,560	14,360	95.73

Delete Line	Entity Type	Planned Dollars			% SATTA Allocation (1,200)
		Direct Services	Administrative Activities	Total	
<input checked="" type="checkbox"/>	Treatment	900	100	900	75
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
<input type="checkbox"/>		0	0	0	0
SATTA Entity Grand Total		900	100	900	75

Submit Reset Cancel

Note: Data entry of Direct Service and Administrative Service costs is optional.

The operation of this page has not changed. The user will be allowed to make updates to the page as long as the plan is in a status of 'Draft' or 'Final'. To save changes the user will select the submit button.

Service/Activity Plan

This page has undergone two changes. The first change is the elimination of the split between Direct and Administrative Services. Counties will be required to report their planned dollars by service/activity type only. Existing plans direct and administrative planned dollars have been combined.

The second change is the addition of the new SATTA (SB 223) reporting requirements. The following fields have been added:

- Total projected spending for Drug Testing for SACPA clients
- Total projected spending for Other Purposes

An example of the page is displayed on the following page:

Welcome to **California**

Department of Alcohol and Drug Programs **SACPA Reporting Information System**

Sutter County **Dept of Human Svcs/Div of Mental Hlth-Alcohol and Drug Prgrms**

Original Plan Service/Activity Information for Fiscal Year 2002/2003, Version 3

Status: Draft Created: 03/13/2002 Last Revised: 03/15/2002

To add/update Plan Service/Activity Information, enter Planned Dollars Information and click the Submit button.

	Planned Expenditures	% ADP Allocation (15,000 + 0 = 15,000)
Services		
Drug Treatment		
Non-Residential/Outpatient		
Treatment/Recovery - No Meds	1,000	6.67
Treatment/Recovery - Methadone, LAAM, or Other Meds Prescribed	1,000	6.67
Day Program-Intensive	100	0.67
Detoxification - No Meds	1,000	6.67
Detoxification - Methadone, LAAM, or Other Meds Prescribed	1,000	6.67
Non-Residential/Outpatient Subtotal	4,100	27.33
Residential		
Detoxification (Hospital)	1,000	6.67
Detoxification (Non-Hospital) - No Meds	100	0.67
Detoxification (Non-Hospital) - Methadone, LAAM, or Other Meds Prescribed	8,000	53.33
Treatment/Recovery - No Meds	0	0
Treatment/Recovery - Methadone, LAAM, or Other Meds Prescribed	0	0
Residential Subtotal	9,100	60.67
Drug Treatment Subtotal	13,200	88
Other Service		
Literacy Training	1,200	8
Family Counseling	0	0
Vocational Training	0	0
Other Client Services	0	0
If Other Client Services planned, please provide details below		
<input type="text"/>		
<input type="text"/>		
Other Service Subtotal	1,200	8
Services Subtotal	14,400	96
Case Management Activities		
Referral/Assessment	130	0.87
Placement	150	1
Court Monitoring	0	0
Supervision	0	0
Miscellaneous Activities	0	0
If Miscellaneous Activities planned, please provide details below		
<input type="text"/>		
<input type="text"/>		
Case Management Activities Subtotal	280	1.87
Grand Total	15,680	101.56
SATTA (SB 223)		
Drug Testing for SACPA Clients	700	58.33
Other Purposes	200	16.67
SATTA (SB 223) Totals	900	75

Submit Reset Cancel

The operation of this page has not changed. The user will be allowed to make updates to the page as long as the plan is in a status of 'Draft' or 'Final'. To save changes the user will select the submit button.

Client Projections

The Client Projections page has changed to include the new SATTA (SB 223) reporting requirements. The following fields have been added:

- Total number of SACPA clients projected for drug testing
- Total number of tests projected for SACPA clients

An example of the page is displayed on the following page:

Welcome to **California**
HOLLYWOOD

Department of Alcohol and Drug Programs

SACPA Reporting Information System

Sutter County
Dept of Human Svcs/Div of Mental Hlth-Alcohol and Drug Prgrms

Original Plan Client Projections for Fiscal Year 2002/2003, Version 3

Status: Draft Created: 03/13/2002 Last Revised: 03/15/2002

To add/update Client Projections, enter Number of Clients information and click the Submit button.

[CA Home Page](#)
[ADP Home Page](#)
[SACPA Home Page](#)
[Change Password](#)
[Fiscal Year Setup](#)
[County Information](#)
[County Plans](#)

[Entry Service](#)
[Client Projections](#)
[Capacity Projections](#)
[Plan Questions](#)
[Plan Desc. Files](#)

[Expenditures](#)
[Financial Status](#)
[Other Services Client Counts](#)
[Other Services Waiting List Counts](#)
[Reporting](#)

Projected Number of Clients	
Referred From Parole	0
Referred From Court/Probation	0
Grand Total	0

Projected Number of Clients	
Drug Treatment	
Non-Residential/Outpatient	
Treatment/Recovery - No Meds	0
Treatment/Recovery - Methadone, LAAM, or Other Meds Prescribed	0
Day Program-Intensive	0
Detoxification - No Meds	0
Detoxification - Methadone, LAAM, or Other Meds Prescribed	0
Non-Residential/Outpatient Subtotal	0
Residential	
Detoxification (Inpatient)	0
Detoxification (Non-Hospital) - No Meds	0
Detoxification (Non-Hospital) - Methadone, LAAM, or Other Meds Prescribed	0
Treatment/Recovery - No Meds	0
Treatment/Recovery - Methadone, LAAM, or Other Meds Prescribed	0
Residential Subtotal	0
Drug Treatment Subtotal	0
Other Service	
Literacy Training	0
Family Counseling	0
Vocational Training	0
Other Client Services	0
If Other Client Services planned, please provide details below	
Other Service Subtotal	0
Grand Total	0

	Total Number of Clients Projected	Total Number of Tests Projected
SATTA (SB 223)		
Drug Testing	5,000	600

The operation of this page has not changed. The user will be allowed to make updates to the page as long as the plan is in a status of 'Draft' or 'Final'. To save changes the user will select the submit button.

Capacity Projections

This page has not been changed other than the format changes to comply with the Governor's web page standards (see section D for details). An example of the page is displayed below:

Welcome to **California** HOLLYWOOD

Department of Alcohol and Drug Programs SACPA Reporting Information System

Sutter County Dept of Human Svcs/Div of Mental Hlth-Alcohol and Drug Prgrms

Original Plan Capacity Projections for Fiscal Year 2002/2003, Version 3

Status: County Approved Created: 03/13/2002 Last Revised: 03/19/2002

To add/update Capacity Projections Information, enter Capacity Information and click the Submit button.

	Existing	Capacity Planned Additional	Total
Drug Treatment			
Non-Residential/Outpatient			
Treatment/Recovery - No Meds	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Treatment/Recovery - Methadone, LAAM, or Other Meds Prescribed	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Day Program-Intensive	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Detoxification - No Meds	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Detoxification - Methadone, LAAM, or Other Meds Prescribed	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Non-Residential/Outpatient Subtotal	0	0	0
Residential			
Detoxification (Hospital)	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Detoxification (Non-Hospital) - No Meds	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Detoxification (Non-Hospital) - Methadone, LAAM, or Other Meds Prescribed	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Treatment/Recovery - No Meds	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Treatment/Recovery - Methadone, LAAM, or Other Meds Prescribed	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Residential Subtotal	0	0	0
Drug Treatment Subtotal	0	0	0
Other Service			
Literacy Training	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Family Counseling	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Vocational Training	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Other Client Services	<input type="text" value="0"/>	<input type="text" value="0"/>	0
If Other Client Services exist or are planned, please provide details below			
<input type="text"/>			
Other Service Subtotal	0	0	0
Grand Total	0	0	0

Submit Reset Cancel

Plan Questions Page

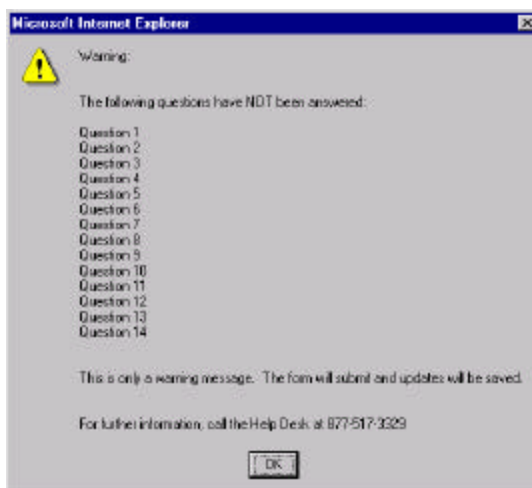
If the user chooses to go to the Plan Questions page the user will have the option to answer or update the Plan Questions from Part I of the County Plan Template. An example of the screen is displayed on the following pages:

CA Home Page ADP Home Page SACPA Home Page Change Password Fiscal Year Setup County Information County Plans Entity Service Client Projections Capacity Projections Plan Questions Plan Desc. Files Expenditures Financial Status Other Services Client Counts Other Services Waiting List Counts Reporting	<p>Sutter County Dept of Human Svcs/Div of Mental Hlth-Alcohol and Drug Prgrms</p> <p>Original Plan Questions for Fiscal Year 2002/2003, Version 3</p> <p>Status: Draft Created: 03/13/2002 Last Revised: 03/15/2002</p> <p>To update Plan Questions, answer each question and click the Submit button.</p> <p>1. Has the county board of supervisors approved the 2002/2003 county plan or approved a written delegation of approval authority to the county lead agency from the county board of supervisors? (ref: §3515 (b)(3)) (Check one)</p> <p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No (expected date of approval) <input type="text"/></p> <p>2. Identify the county agencies and other entities involved in developing the county plan. (Check all that apply)</p> <p>Required</p> <p><input type="checkbox"/> County alcohol and other drug agency</p> <p><input type="checkbox"/> Court</p> <p><input type="checkbox"/> Parole authority</p> <p><input type="checkbox"/> Probation Department</p> <p>Other</p> <p><input type="checkbox"/> County executive office</p> <p><input type="checkbox"/> County mental health</p> <p><input type="checkbox"/> County office of education</p> <p><input type="checkbox"/> County public health</p> <p><input type="checkbox"/> County social services</p> <p><input type="checkbox"/> District attorney</p> <p><input type="checkbox"/> Police department</p> <p><input type="checkbox"/> Sheriff</p> <p><input type="checkbox"/> Workforce Investment Board</p> <p><input type="checkbox"/> Other (specify) <input type="text"/></p> <p>3. List impacted community parties that collaborated in development of the county plan. (Check all that apply)</p> <p>Required</p> <p><input type="checkbox"/> Providers of drug treatment services in the community</p> <p><input type="checkbox"/> Representatives of drug treatment associations in the community</p> <p>Other</p> <p><input type="checkbox"/> Civic groups</p> <p><input type="checkbox"/> Clients / Client groups</p> <p><input type="checkbox"/> Colleges/Universities (specify) <input type="text"/></p> <p><input type="checkbox"/> Local business representatives</p> <p><input type="checkbox"/> Non-profit organizations</p> <p><input type="checkbox"/> Parent Teacher Group / Parent Teacher Association</p> <p><input type="checkbox"/> Workforce Investment Board</p> <p><input type="checkbox"/> Youth organizations</p> <p><input type="checkbox"/> Other (specify) <input type="text"/></p>
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	<p>4. How was community input collected? (Check all that apply)</p> <p><input type="checkbox"/> Community meetings</p> <p><input type="checkbox"/> County advisory groups</p> <p><input type="checkbox"/> Focus groups</p> <p><input type="checkbox"/> Other method(s) (explain briefly) <input type="text"/></p> <p>5. If there are federally recognized American Indian tribe(s) located within your county, did you include their input? (Check one)</p> <p><input type="checkbox"/> Yes (required if such tribes are located in your county)</p> <p><input type="checkbox"/> No federally recognized American Indian tribe(s) in the county</p> <p>6. Specify how often entities and impacted community parties met to develop the county plan. (Check one)</p> <p><input type="checkbox"/> 1-2 times per year</p> <p><input type="checkbox"/> 3-4 times per year</p> <p><input type="checkbox"/> 5 or more times per year</p> <p>7. Specify how often entities and impacted community parties will meet to continue on-going coordination of services and activities. (Check one)</p> <p><input type="checkbox"/> Every three months</p> <p><input type="checkbox"/> 4-8 times per year</p> <p><input type="checkbox"/> 9 or more times per year</p> <p>8. What services are available to SACPA clients under the county plan? (Check all that apply)</p>
	<p><input type="checkbox"/> Drug treatment</p> <p><input type="checkbox"/> Family counseling</p> <p><input type="checkbox"/> Literacy training</p> <p><input type="checkbox"/> Mental health</p> <p><input type="checkbox"/> Vocational training</p> <p><input type="checkbox"/> Other (specify) <input type="text"/></p> <p>9. Identify the entity(ies) responsible for determining a client's level of need for, placement in, and referral to drug treatment. (Check all that apply)</p> <p><input type="checkbox"/> County alcohol and other drug agency</p> <p><input type="checkbox"/> Probation Department</p> <p><input type="checkbox"/> Drug treatment provider(s)</p> <p><input type="checkbox"/> Other (specify) <input type="text"/></p> <p>10. Identify the entity(ies) in your county responsible for determining a client's level of need for, placement in, and referral to additional services supplemental to treatment. (Check all that apply)</p> <p><input type="checkbox"/> County alcohol and other drug agency</p> <p><input type="checkbox"/> Drug treatment provider(s)</p> <p><input type="checkbox"/> Probation department</p> <p><input type="checkbox"/> Other (specify) <input type="text"/></p> <p>11. What assessment tools are being used in your county for SACPA clients? (Check all that apply)</p>

The screenshot shows a web form for the SACPA Reporting Information System. At the top, there are three checkboxes: ☐ ASI (Addiction Severity Index), ☐ ASAM PPC (American Society of Addiction Medicine Patient Placement Criteria), and ☐ Other (specify) followed by a text input field. Below these are three numbered questions, each with a "(Check one)" instruction. Question 12 asks "Will drug testing be required for SACPA clients in your county?" with options ☐ Yes and ☐ No. Question 13 asks "What other sources of funds, if any, will be used to pay for drug testing? (ref: §9530 (b))" with options ☐ Client fees, ☐ Additional funds budgeted by the county, and ☐ Other (specify) followed by a text input field. Question 14 asks "Has there been a change in Lead Agency designation?" with options ☐ Yes and ☐ No. Below the questions is a "Notes" section with a large text area. At the bottom right are three buttons: "Submit", "Reset", and "Cancel".

To answer the questions the user will choose the check box next to the appropriate response for each question. If the user does not select at least one response to each question, the system will prompt the user with the following warning when choosing the submit button:



Also, if a response is chosen that requires additional information, for example question #2 'No (specify)', the user will be required to enter a brief explanation of their response before submitting the page.

As with the other Plan sections the function buttons will be at the bottom of the screen and will include:

- ◆ Submit – initiates a system edit validation on the page and saves the data entry
- ◆ Reset – Resets page to state at the time of the last submit
- ◆ Cancel – Returns user to the 'Plan List' without saving changes

Plan Description Files

The Plan Description Files page allows the automated submission of the County Plan Narrative document. This new functionality allows the user to attach, view, download and delete Plan Description files.

Users will be restricted from uploading more than one Plan Description file and one Board of Supervisors Resolution (or other Board approval document) per County Plan. Users will not be able to modify documents on-line. To make changes the user will be required to delete the existing Plan Description and upload a modified document.

A description of how to use the new functionality follows.

Attach a File

County users will have the ability to attach a Plan Description document and a Board of Supervisors Resolution (or other approval document) through a system of file upload. The process will require that the county create these documents using Word with an extension of .DOC.

What to Do

1. To attach a document, select the type of document you would like to attach by choosing the radio button next to your selection

Results/Comments

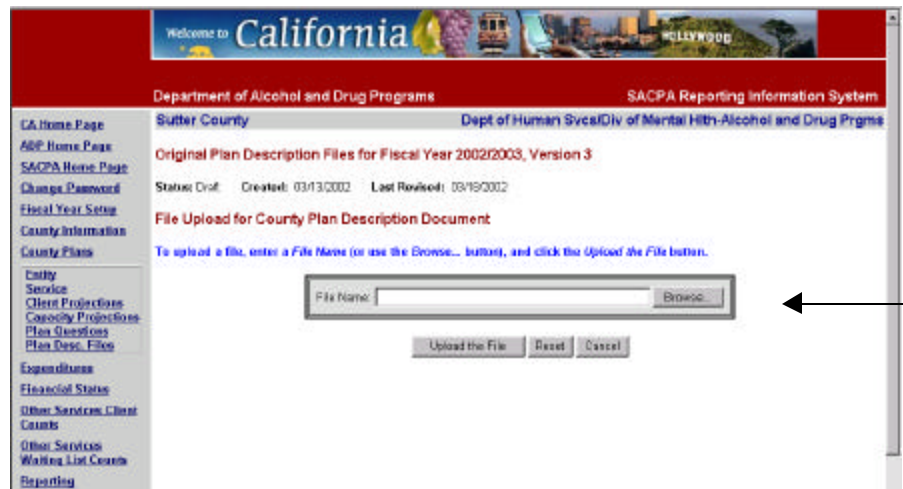
The user can choose between 'County Plan Description' and 'Board of Supervisors Resolution'

The screenshot shows the SACPA Reporting Information System interface. The sidebar on the left contains navigation links: GA Home Page, ASP Home Page, SACPA Home Page, Change Password, Fiscal Year Setup, County Information, County Plans, Links, Service, Client, Projection, Capacity, Projection, Plan Questions, Plan Desc. Files, Expanded Items, Financial Status, Other Services, Client, County, Other Services, Waiting List, County, Reporting. The main content area is titled 'Department of Alcohol and Drug Programs' and 'SACPA Reporting Information System'. It shows 'Butter County' and 'Dept of Human Svcs/Div of Mental Hlth-Alcohol and Drug Prgrms'. The section is 'Original Plan Description Files for Fiscal Year 2002/2003, Version 3'. It includes a table for 'Plan Description Files' with columns: Document Type, Document Name, Date Uploaded, and User ID of Upload. The table has two rows: 'County Plan Description' and 'Board of Supervisors Resolution', both with 'No Document Uploaded'. Below the table are 'Upload' and 'Cancel' buttons. Arrows point to the 'Plan Desc. Files' link in the sidebar and the 'Upload' button.

Document Type	Document Name	Date Uploaded	User ID of Upload
<input type="radio"/> County Plan Description	No Document Uploaded		
<input type="radio"/> Board of Supervisors Resolution	No Document Uploaded		

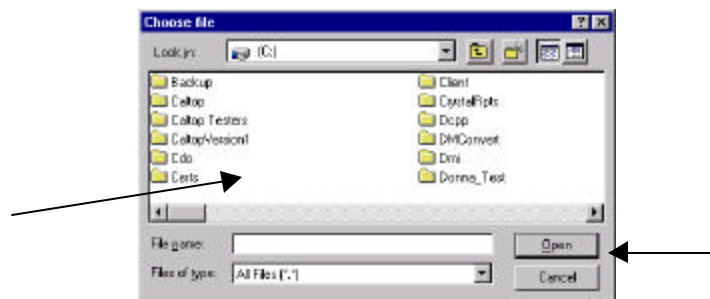
2. Choose the 'Upload' button

This will bring the user to the File Upload screen



3. Choose the 'Browse' button

This will allow the user to select a file and will open a 'choose file' window



4. Select the appropriate file and choose the 'Open' button

This will display the file name on 'File Name:' window of the File Upload page

5. Select the 'Upload the File' button

This will upload the file to the database and will return the user to the Plan Description Files page. The file name will be displayed under document name

Department of Alcohol and Drug Programs SACPA Reporting Information System

Sutter County Dept of Human Svcs/Div of Mental Hlth-Alcohol and Drug Prgrms

Original Plan Description Files for Fiscal Year 2002/2003, Version 3

Status: Draft Created: 03/13/2002 Last Revised: 03/18/2002

Plan Description Files

To delete a document, select the Document and click the Delete button
 To upload a document, select the Document Type and click the Upload button
 To download a document, right click on the Document Name link and select Save Target As... (Internet Explorer) or Save Link As... (Netscape Navigator).

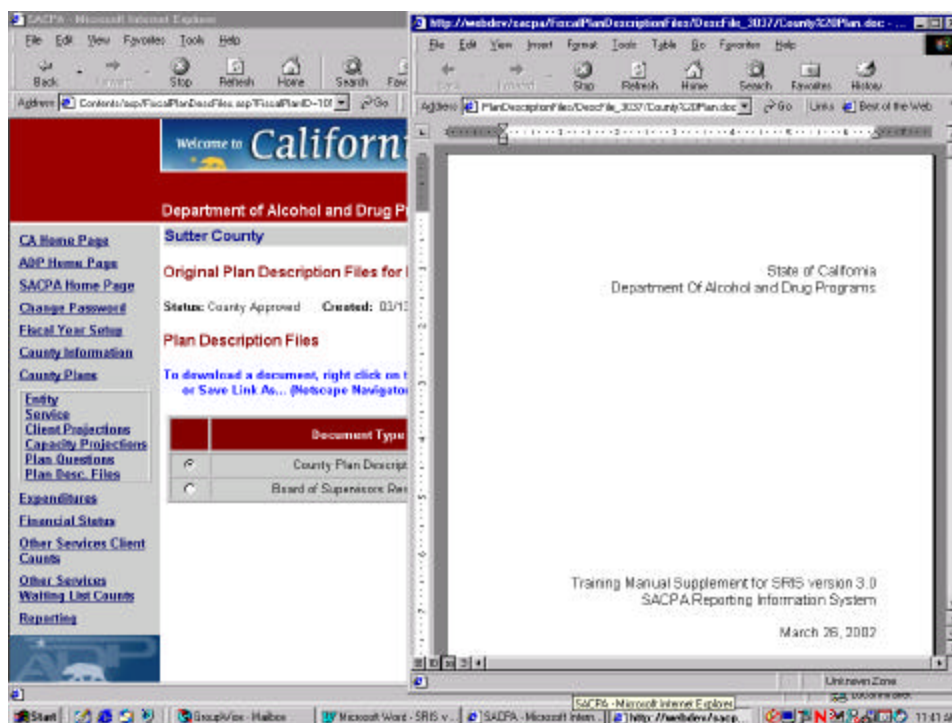
	Document Type	Document Name	Date Uploaded	User Id of Upload
<input checked="" type="checkbox"/>	County Plan Description	County Plan.doc	03/18/2002	TESTERN4
<input type="checkbox"/>	Board of Supervisors Resolution	No Document Uploaded		

Delete Upload Cancel

View a File

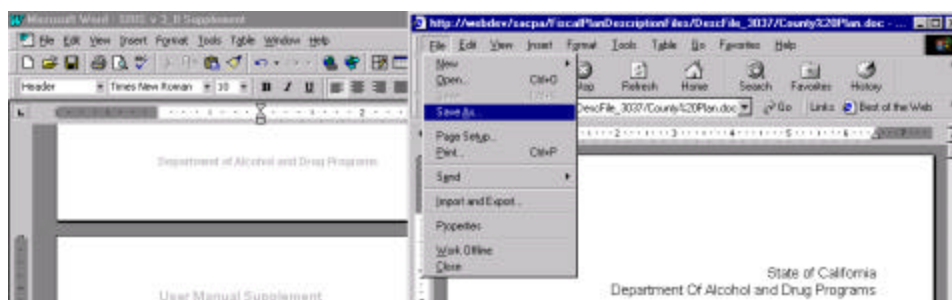
To view a file that has been uploaded, right click on the document link under the 'Document Name' header. In the example above, the user would right click on the [County Plan.doc](#). This will open the document in a separate window. If the document is not compatible with Microsoft Word, the document will not be displayed.

An example of how the document will be display is shown on the following page:



Download a File

To download a file the user must choose save the document while the document is being viewed. To save the document, choose 'File' from the menu bar of the new window and select 'Save As'.



A window will appear allowing the user to save the document wherever they choose.

Delete a Document

To delete a file the user will select the document type using the radio button next to their selection and choose the delete button. This will delete the existing document from the database.

Plan Revision

County users have the option create revisions. If the user chooses to create a plan revision the Plan Description files and the Plan Questions associated with that plan will be copied as well. Two new buttons have been added to the page:

- Create Revision and Go to Plan Questions
- Create Revision and Go to Plan Description Files

An example of the page is displayed below:

The screenshot shows the 'Create Plan Revision' page within the SACPA Reporting Information System. The header includes 'Welcome to California' and 'HOLLYWOOD'. The main header identifies the user as 'Sutter County' and the system as 'SACPA Reporting Information System'. A left sidebar contains a menu with links: 'CA Home Page', 'ADP Home Page', 'SACPA Home Page', 'Change Password', 'Fiscal Year Setup', 'County Information', 'County Plans', 'Expenditures', 'Financial Status', 'Other Services Client Counts', 'Other Services', 'Waiting List Counts', and 'Reporting'. The main content area is titled 'Create Plan Revision' and includes the text 'Create a revision for Fiscal Year: 2001/2002' and 'Using the Latest Revised Plan or Original Plan for the Fiscal Year selected above'. Below this is a 'Set the Revision Date to' field with a date picker. At the bottom, there are six buttons arranged in two columns: 'Create Revision & Go To Entity', 'Create Revision & Go To Activity', 'Create Revision & Go To Client Projections', 'Create Revision & Go To Capacity Projections', 'Create Revision & Go To Plan Questions', and 'Create Revision & Go To Plan Description Files'. 'Reset' and 'Cancel' buttons are located at the bottom center.

B. Addition of Inquiry Only Access for County and ADP Users

County will have the option to choose between two different types of user rights: update and inquiry only access. This new inquiry only access will allow the user to view everything the update user can view but will be restricted from making changes.

Below is an example of the Plan List as seen by a 'Inquiry Only' county user.

The screenshot shows the SACPA Reporting Information System interface. At the top, there is a banner for California with a 'Welcome to' message. Below the banner, the page is titled 'Department of Alcohol and Drug Programs' and 'SACPA Reporting Information System'. The user is logged in as 'Sutter County' under the 'Dept of Human Svcs/Div of Mental Hlth-Alcohol and Drug Prgrms'. The main heading is 'Plan List'. Below this, a message states: 'To view a Plan, select a Fiscal Year and Version and click the View buttons.' A table lists two plans:

	Fiscal Year	Plan Type	Version or Rev.Date	Last Revised	Status	Total \$ Allocated per Plan (Entity)	ADP \$ Allocation	Allocation \$ Difference (ADP Allocation - Plan (Entity))
<input type="radio"/>	2002/2003	0	3	03/19/2002	Draft	14,360	16,000	640
<input type="radio"/>	2001/2002	0	2	03/15/2002	ADP Approved	10,700	11,000	300

Below the table are several buttons for viewing details: 'View Entity', 'View Service/Activity', 'View Client Projections', 'View Capacity Projections', 'View Plan Questions', and 'View Plan Description Files'. A left sidebar contains a list of navigation links: 'CA Home Page', 'ADP Home Page', 'SACPA Home Page', 'Change Password', 'Fiscal Year Setup', 'County Information', 'County Plans', 'Expenditures', 'Financial Status', 'Other Services Client Counts', 'Other Services', 'Waiting List Counts', and 'Reporting'.

To request a user be set up with 'inquiry only' access to the system complete the Form 10098 (see attached). This form can be found on ADP's web site at

http://www.adp.state.ca.us/SACPA/P36_SRIS_SystemDocumentation.shtml.

C. Automation of County Submissions for SATTA (SB 223)

The SACPA Reporting Information System will be modified to include reporting of planned spending of SATTA (SB 223) funds. The following modules will be affected by these new reporting requirements: Fiscal Year Setup and County Plan (Entity Plan, Service/Activity Plan, and Client Projections). The changes to the Entity Plan, Service/Activity Plan and Client Projections Plan are discussed in County Plan Element Changes (starting on page 5).

SATTA (SB 223) Allocations Display

Fiscal Year Setup page has been updated to display the SATTA allocation. ADP staff has entered these amounts. This allocation amount is not included in the 'Total ADP \$ Allocation for Fiscal Year', but remains as a separate funding source. This new field does not require update by county users.

The screen changes are displayed below:

Department of Alcohol and Drug Programs SACPA Reporting Information System

Sutter County Dept of Human Svcs/Div of Mental Hlth-Alcohol and Drug Prgrms

Fiscal Year Information for Fiscal Year 2002/2003

To update Fiscal Year information, update data and click the Submit button.

Excess Funds Carry Over \$	Calculated ADP \$ Distribution for Fiscal Year	Total ADP \$ Allocation for Fiscal Year	SATTA (SB 223) \$ Allocation for Fiscal Year
500	15,000	15,500	1,200

County Employer ID Number

11 - 111111

Submit Reset Cancel

The following is a description of the three allocation fields from the Fiscal Year Setup page:

- **Calculated ADP \$ Distribution for Fiscal Year:** This represents the distribution of SACPA funds from ADP for the fiscal year for the county.
- **Total ADP \$ Allocation for Fiscal Year:** This represents the distribution of SACPA funds from ADP plus the excess funds rolled over from the prior year. This total represents SACPA funds only.
- **SATTA (SB 223) \$ Allocation for Fiscal Year:** This represents the ADP allocation of SATTA (SB 223) funds.

D. Governor's Web Page Standards

Analysis was done on the Governor's Web Page Standards (or Style Implementation Guidelines) as published at <http://www.webmasters.ca.gov>. All sections of these guidelines were reviewed, including Overview, HTML Guide, Graphic Guide and the Accessibility Guide.

To meet the standard set by the Governor the following changes were made to the system:

1. The header and menu bar were changed to match the standard California format.
2. The navigation bar on the left and the header will scroll with the page as the user scrolls down the pages and forms in the system. 'Back to the Top' links have been added to the bottom of each screen to allow the user to move back up the page to the navigation bar quickly.
3. Drop down boxes have been changed to scroll boxes or lists with radio buttons.

An example of a screen with a scroll box is displayed below: